Installation Guide for

DL Tools for Windows

Release 7.0

U.S. Department of Education

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Introduction

Preface

Direct Loan Tools for Windows (DL Tools) is a multi-year Windows-based application designed to provide the following functionality related to all Direct Loan schools' software:

* Compare the School Account Statement (SAS) to loans and actual disbursements recorded in EDExpress or an external file, and/or to Cash Receipts and Refunds of Cash in the DL Tools Cash database.

* Print the SAS in a readable format.

* Track Cash Receipts (drawdowns) and Refunds of Cash for Direct Loans.

* Rebuild your Direct Loan origination and disbursement records in EDExpress using an automated process.

DL Tools processes data for multiple program years. Release 7.0 contains SAS Compare and formatting, Cash Management, and Rebuild functionalities for the 2005-2006, 2006-2007, and 2007-2008 cycles.

All Direct Loan schools can use the Compare and Cash Management functionality. The Rebuild function is used by schools to rebuild accepted Direct Loan records in EDExpress for Windows databases. However, non-EDExpress users can export data from a rebuilt EDExpress database to recreate non-EDExpress loans or databases. For information on exporting from EDExpress to an external system and creating file formats, see Volume III of the *2007-2008 COD Technical Reference*.

DL Tools Features

Imports

You can import the following data files:

- SAS

- Cash Detail External Add

- Loan Detail External Add

- Disbursement Detail External Add

- Rebuild – When selecting Rebuild as the import type, you have three Rebuild Type options to choose from:

    - Compare Only
    - Update All Records
    - Update Selected Records

Reports

The following reports are available in DL Tools:

- Internal Ending Cash Balance Report

- Cash Detail Comparison

- Loan Detail Comparison – Loan Level

- Disbursement Detail Comparison

- SAS Cash Detail

- SAS Loan and Disbursement Detail

- Disbursement Measurement Tool Report (requires an EDExpress database connection)

Access 2002

The DL Tools database uses a Microsoft Access 2002 format. Note the following:

- Access 2002 software databases are compatible with all currently supported Microsoft Windows operating systems (Windows 2000 and Windows XP).

- You do *not* need any version of Microsoft Access installed on your PC to use current or future releases of DL Tools.

- You cannot open or view the DL Tools for Windows database using a version of Microsoft Access earlier than Access 2002. Microsoft Access 2002 databases are incompatible with other versions of Access.

ED continues to discourage users strongly from viewing or manipulating any EDESuite software database using Microsoft Access. Making changes to the database (using any version of Microsoft Access) can potentially cause damage to the database structure, affect proper software functionality, and limit our ability to assist you with problems you may encounter as a result.

If you choose to open any EDESuite database using Microsoft Access, you should ensure you are opening a copy of the database and not your live, "production" database. You should also ensure you have safe, reliable backups of your EDESuite databases before using Microsoft Access to open live or backup copies of the databases.

Important Installation Note: You must be an Administrator on your workstation to install DL Tools, Release 7.0 in the Windows 2000 or Windows XP operating systems. If you are not an Administrator, you will receive a warning when you try to install DL Tools. After an Administrator has installed DL Tools, you can run it as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. No workarounds exist for these Windows rights issues. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

Microsoft Windows Vista

At this time, Federal Student Aid has not certified the Microsoft Corporation's recently released Windows Vista as a supported operating system for DL Tools or its other PC software products. This guidance also applies to the Local Area Network (LAN) or "server" version of Windows, known as Windows Server 2008, which is due for release in 2008. We will provide additional information as it becomes available.

Section 508 Compliance

To comply with Section 508 of the Rehabilitation Act, the DL Tools for Windows, Release 7.0 is compatible with screen reader technology used by the visually impaired. Screen reader software cannot interpret color shading in DL Tools software entry fields or directly read the contents of software grid cells. To accommodate these restrictions, DL Tools for Windows, Release 7.0 includes the following features:

- All DL Tools fields that are shaded yellow to indicate they are required also display a "-R" after the software label. The "-R" indicates the field is required.

- All DL Tools grids display "floating" text descriptions of the contents of grid cells when cells are selected. The text displays one cell above (or below, if the first cell is selected) the selected cell. The text lists Row number, Column title, and (if applicable) the current Value. Clicking once in a cell, or using the Tab key or arrow keys to move to a cell, displays the text. Clicking a second time, or using the Tab key or arrow keys to move from a cell, hides the text.

- Floating text is always enabled for the SYSADMIN user ID and always displays in the Startup Information dialog box. To disable the floating text, go to **Tools**, **Setup**, **Security Users** and create a new user ID and password. Exit DL Tools, and then log back in with your new user ID and password. For all user IDs other than SYSADMIN, floating text is disabled by default. To enable floating text, select the **Enable 508 Grid Functionality?** checkbox in the Security Users dialog box.

Note: Users will always see the "-R" label added to software fields.

EDconnect

The Student Aid Internet Gateway (SAIG) is the U.S. Department of Education's (ED's) information highway, linking members of the financial aid community with Federal Student Aid and the Title IV Application Systems. Federal Student Aid provides the EDconnect software to make it possible to send and receive data through the SAIG.

You can download the EDconnect software, the *SAIG Desk Reference for EDconnect*, and the *Installation Guide for EDconnect* from the FSAdownload Web site, located at fsadownload.ed.gov.

Using this Installation Guide

Use the instructions contained in this Installation Guide to install DL Tools for Windows on your PC or local area network (LAN).

In this guide, you will find information on hardware and software requirements, estimating the amount of hard disk space you will need on each computer, LAN compatibility issues, and how to get help.

See "Installation Instructions" in this guide for additional instructions.

Installation Instructions

Installation Process

This section of the Installation Guide provides you with step-by-step instructions for downloading and installing DL Tools on a single-user system.

We provide instructions for network system installations in the "Local Area Network (LAN) Information" section of this installation guide.

Other topics included in this section are:

- Default folder creation with installation

- FSAdownload Web site

- Downloading documentation and software from the FSAdownload Web site

- Installing the software

- Installation log

- Changing the database path for DL Tools

- Uninstalling the software

Folder Creation

The DL Tools installation process automatically creates the following folder for DL Tools files on your local hard drive:

C:\Program Files\EDESuite\DL Tools for Windows

Caution: You can change the default drive and folder name during installation. If you do modify the drive and folder name, you must remember to change to this alternate location during the installation process for each DL Tools software update you receive for enhancements to be loaded properly.

FSAdownload Web Site

You can download the DL Tools software in two formats from the FSAdownload Web site, located at fsadownload.ed.gov. You can download the entire software in one file, called DLTool7X.exe, where "7X" is the release number (for example, DL Tools Release 7.0's single install file is called DLTool70.exe). Alternatively, you can download the software in separate installments, which you can copy to a LAN, CD, or other portable storage format. See "Downloading Software from the FSAdownload Web Site" in this guide for more details.

Installation Steps at a Glance

Step	Action	Reference
1	Download all supporting documentation from fsadownload.ed.gov.	Read "Downloading Documentation from the FSAdownload Web Site" for instructions.
2	Download the software from fsadownload.ed.gov.	Read "Downloading Software from the FSAdownload Web Site" for instructions.
3	Install the software.	Read the "Installing the Software on a Single-User System" section for instructions.

Downloading Documentation and Software from the FSAdownload Web Site

You can download Federal Student Aid software and documentation from the FSAdownload Web site, located at <u>fsadownload.ed.gov</u>. The FSAdownload Web site also houses user documentation such as the DL Tools Cover Letter and the *2007-2008 COD Technical Reference, Volume IV (DL Tools)* for more information and guidance regarding DL Tools.

Sample Download Times

The amount of time it takes to download a file depends on the file size and the speed of the Internet connection. If you do not have a direct connection to the Internet, we recommend at least a 56 kbps modem.

The table below shows approximate download times for various file sizes and connection speeds. The actual times vary depending on the type and quality of your Internet connection.

Download Speed	1 Megabyte	5 Megabytes	10 Megabytes
33.6 kbps	5 min.	25 min.	51 min.
56 kbps (53 kbps)	3 min.	16 min.	32 min.
768 kbps or higher (typical for cable modems and DSL)	15 sec. or less	1 min., 15 sec or less	2 min., 30 sec or less
1.5 mbps or higher (typical for T1 lines)	7.5 sec. or less	37 sec. or less	1 min., 15 sec. or less

Getting Help

- Some organizations restrict their users from downloading programs from Internet sites. If you are having trouble downloading, contact your technical support staff to ensure you have full download rights.

Downloading Documentation from the FSAdownload Web Site

You can download DL Tools documentation from the FSAdownload Web site, located at fsadownload.ed.gov, in Adobe PDF (Portable Document Format).

The following types of documentation are available to download for DL Tools:

- *DL Tools Release 7.0 Cover Letter*

- *2007-2008 Common Origination and Disbursement (COD) Technical Reference, Volume IV (DL Tools)*

Each document description includes the date it was posted, the file size, and gives an approximate download time. The download time for a document depends on the speed of your Internet connection.

To Download Documentation

1. Go to the address field located at the top of your Web browser's window and type fsadownload.ed.gov. You may need to press the **Enter** key or click the **Go** button.

2. To download the *DL Tools Release 7.0 Cover Letter*:

   - Click the **Software and Associated Documents** link.
   - Click **DL Tools Release 7.0** to the left of the description to view the DL Tools Release 7.0 software download page.

   To download *2007-2008 COD Technical Reference, Volume IV (DL Tools)*:

   - Click the **Technical References and Guides** link.
   - Click the **2007-2008** link under **COD Technical Reference** for **DL Tools** to view the download page.

3. Click the **PDF Format** link associated with the file you want to download.

4. If you would like to save a copy of the document to your system click **File**, **Save As** from the browser menu bar. Select a location on your computer, and then click the **Save** button to save the file. If **Save As** is not available, you can also click the diskette button to select a location to save the file to your computer. The Web site is designed to give the file a default name; however, you can choose another name for the file.

5. After the document is downloaded, go to the saved location and double-click the file to open and/or print it.

Downloading DL Tools from the FSAdownload Web Site

The DL Tools, Release for Windows, Release 7.0 software is available for download from the FSAdownload Web site, located at fsadownload.ed.gov, in two formats. You can download the entire program in one file or in separate installments, which can be copied to a LAN, CD, or other portable storage format.

To Download the Software as One File

1. Go to the address field located at the top of your Web browser's window and type fsadownload.ed.gov. You may need to press the **Enter** key or click the **Go** button.

2. Click the **Software and Associated Documents** link on the left-hand side of the page.

3. Click the **Direct Loan Tools Release 7.X** (where X is the release number) link. You are taken to the download site.

4. Click the **Full Download** link in the software section to download the program as a single file. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk**.

5. Select the download location and click **Save**.

   Note: The length of time it takes to download the software depends on the speed of your Internet connection.

6. After the file is downloaded, go to the saved location and double-click **DLTool7X.exe** (where 7X is the release number) to extract the file and install DL Tools.

Note: See "Installing the Software on a Single-User System" or "Installing the Software on a LAN" in this guide for more information on how to install DL Tools after you have downloaded the software.

To Download the Software in Separate Installments

1. Go to the address field located at the top of your Web browser's window and type fsadownload.ed.gov. You may need to press the **Enter** key or click the **Go** button.

2. Click the **Software and Associated Documents** link on the left-hand side of the page.

3. Click the **Direct Loan Tools Release X** (where X is the release number) link. You are taken to the download site.

4. Click the **Disk 1** link in the software section. If you are given the option to **Run this program from its current location** or **Save this program to disk**, select **Save this program to disk.**

5. Select the download location and click **Save**.

   Note: The length of time it takes to download the software depends on the speed of your Internet connection.

6. After the download of Disk 1 is finished, click **Disk 2**. Save Disk 2 to the same location as Disk 1.

7. Click each succeeding disk until each disk has been saved to the same location on your computer.

8. After the software disk files are downloaded to your computer, go to that location, double-click **disk1.exe**, and unpack it to the same folder where the other disks were downloaded. Disk 1 is a self-extracting zip file. Then double-click **setup.exe** to install the DL Tools software.

Note: See "Installing the Software on a Single-User System" or "Installing the Software on a LAN" in this guide for more information on how to install DL Tools after you have downloaded the software.

Installing the Software on a Single-User System

Downloading DL Tools from the FSAdownload Web site, located at fsadownload.ed.gov, does not install the software on your system. After downloading the software to your computer, you must run the installation program to load the software to your PCs or LAN. To install the software on a LAN, see "Installing the Software on a LAN" in this guide.

Important Installation Note: You must be an Administrator on your workstation to install DL Tools, Release 7.0 in the Windows 2000 or Windows XP operating systems. If you are not an Administrator, you will receive a warning when you try to install DL Tools. After an Administrator has installed DL Tools, you can run the software as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. No workarounds exist for these Windows rights issues. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

Installation Options

You can install the DL Tools software to a standalone PC using one of two options:

1. **Stand Alone Full.** Use this option when you are installing DL Tools, Release 7.0 to a single, non-networked computer for the first time and want to install all available DL Tools modules.

   Warning for Subsequent Installations: Use caution when using the Stand Alone Full installation option. This option overwrites your existing DL Tools database (**DLT.mdb**) and all program files (including **DLT.exe**), as well as any annotations you may have made to online Help.

2. **Stand Alone Custom.** For DL Tools for Windows, Release 7.0, Stand Alone Custom is the default selection. Use a Stand Alone Custom installation in one of two ways on a single non-networked computer:

   - To upgrade DL Tools (for example, from Release 6.0 to Release 7.0, or from Release 7.0 to Release 7.1), choose the Stand Alone Custom installation option and select everything except Database (*.mdb). This is the default.

   - **Note**: If you previously installed a full release of DL Tools, you can use the Stand Alone Custom option to add files such as Help files (*.hlp), the executable (*.exe) file, or the database (*.mdb) that you did not select when you initially installed the software.

Caution: Selecting **Database** during a Stand Alone Custom installation overwrites your existing DL Tools database, including all student data.

The database is updated with the DL Tools Release 7.0 changes the first time you access the Release 7.0 software following completion of all of your Stand Alone Custom installations. You will no longer be able to access data in this database using DL Tools Release 6.0 after this.

Important Back-up Note: You cannot access 2004-2005 data in your DL Tools database after you upgrade from Release 6.0 to Release 7.0. We strongly recommend you create a back-up copy of your Release 6.0 database (DLT.mdb) before upgrading to Release 7.0, in the event that you need to access your 2004-2005 data using an earlier version of DL Tools on another PC.

Steps to Install

1. Close all running Windows applications.

2. If you downloaded the **DLTool7X.exe** (where "7X" is the release number) file from the FSAdownload Web site, go to the location of that downloaded file.

3. Double-click the **DLTool7X.exe** file to start the installation. The file unpacks itself into a temporary folder and continues the installation.

4. DL Tools asks you a series of questions during the installation. The default answer for each question is already selected for you. Under normal circumstances, you should accept the default answer.

   If the default answer is correct, click **Next**.

   You can change the default folder location and name during installation. If you do modify the folder location and name, you must remember to change the new folder location and name during the installation process for each DL Tools software update you receive for enhancements to be loaded properly.

   Note: Click **Yes** if you receive a message asking if you want to overwrite any read-only files when installing the software.

5. Continue this process until you reach the last installation dialog box, which prompts you to click the **Finish** button.

6. When the DL Tools installation process is complete, your Start menu is updated and displays an icon for DL Tools for Windows, Release 7.0. However, desktop icons are not created automatically. You are prompted to restart your computer to complete the installation.

Installing Subsequent Releases

When you install an update release of the DL Tools software (for example, from Release 7.0 to a version of the same year, such as Release 7.1), which may be posted to resolve software issues, a special process updates the database. The update process occurs the first time the software is started after installing the software upgrade. It runs only once, whether in a standalone or network database. If there are no updates to the database, this update does not occur.

Note: See "Installation Options" in this installation guide for more information about installing subsequent releases.

Windows Installation Log

When you first install DL Tools Release 7.0, an installation log is created in the Windows directory of the workstation (for example, **C:\Windows**) named **DLTools7X.log**. The DL Tools installation log is updated during each installation and contains a detailed record of all files affected during the installation of the software.

The information tracked in the installation log includes the DL Tools installation directory, the Windows directory, the Windows system directory, whether or not a CD-ROM is available, screen resolution, disk space available, boot drive, install engine, extended memory, and information about files before and after installation. This information can be helpful to users and to CPS/SAIG Technical Support in researching software issues that may occur.

Changing the DL Tools Database Path

You can change the DL Tools database path from within the DL Tools software. System administrators may need to use this functionality following the restoration of a back-up DL Tools database (DLT.mdb) or after the relocation of the database from one PC or LAN folder to another directory.

To Change the Database Path

1. Open DL Tools and select **Help**, **System Information**.

2. Click the **Files Information** tab.

3. Click the **Registry** button.

   – A Registry Viewer application displays with a split view.

   – In the left frame, you see a tree-style view, and in the right frame, you see a list-style view with two fields: **Name** and **Value**.

      • Select **Direct Loan Tool** under Year78. If you do not see the "Year78" label in the left frame, left-click the + (plus sign) next to EDESuite. A label indicating the software's year cycle displays under EDESuite.

4. On the right frame of the split window, find **Database** under the Name field, click it, and select **Edit**, **Edit** from the menu bar.

   – A New Registry Value dialog box displays with two edit boxes.

   – One box is labeled "Name" (which is disabled), and the other box is labeled "Value."

5. Enter your **new database path** in the box next to Value. Include the full path and database name (DLT.mdb) exactly as it displays in Windows Explorer, with uppercase and lowercase letters.

6. Press **Enter** or click **OK**.

7. A message displays indicating that the Registry value is saved. Click **OK**.

8. Exit the Registry Viewer by going to **File**, **Exit**.

9. Click **OK** to exit the System Information dialog box.

10. **Exit** the DL Tools software.

The next time you start DL Tools, you will connect to the database using the new database path. You can confirm your connection to the new database by viewing the current database name and location in the status bar on the bottom of the main DL Tools window.

Uninstall

To uninstall DL Tools, click **Start**, **Programs** from your Windows desktop and select **EDESuite**, **DL Tools for Windows** to see an icon for the Uninstall utility.

Warning: If you are running DL Tools on a stand-alone PC, the Uninstall process deletes your current DL Tools database, the executable file, and all Dynamic Link Library (DLL) files, as well as icons created during the installation of the DL Tools software from the Start menu and the software's program group. Do not run the Uninstall process unless you are sure you want to delete these files from your PC.

If your DL Tools database is installed on a LAN, running the Uninstall utility deletes all DL Tools files and icons from your workstation, but does not delete the DL Tools database on your LAN.

To Uninstall DL Tools

1. Click the **Uninstall** icon. A prompt asks if you are sure that you want to remove the application and all of its components completely.

2. Click the **Yes** button.

3. Click **OK**.

DL Tools may also ask you additional questions during the Uninstall process. Click either **Yes** or **No** as appropriate in response to these questions.

Warning: Do *not* uninstall the DL Tools software before performing a Custom installation.

Getting Started

Logging In for the First Time

The first time you start DL Tools, the Startup Information dialog box displays. Before you can use DL Tools, you need to enter the default user ID and password and create a new password. We provide instructions for these tasks in this section.

Startup Information Box

The first time you launch DL Tools, you see the Startup Information dialog box. This dialog box displays various messages, warnings, or errors, and may not appear during subsequent launchings of the software.

To View and Close the Startup Information Box

1. The first time you start DL Tools, the Startup Information dialog box displays.

2. Review the messages, warnings, or errors displayed.

3. Click **Close** or press **Enter** to close the Startup Information dialog box.

User ID and Password

Each time you start DL Tools, you must enter a valid user ID and password. For system security, we recommend you define a unique user ID and password for each user.

To access DL Tools for the first time and establish your new password:

1. Type in the default user ID, **SYSADMIN**.

2. Type in the default password, **SYSADMIN**.

3. Type a new password in the New Password box. You must change the default password by typing a new one in this field.

   You can enter up to eight alphanumeric characters.

4. Type the new password again in the Verify Password field.

   The New Password and Verify Password must be the same.

5. Click **OK** to log in.

Note: The SYSADMIN user ID should be reserved for system administrator functions. All users should have a unique user ID and password for logging into DL Tools to perform "normal" software functions.

Refer to the topic "Security Users dialog box" in online Help for information on setting up user IDs and passwords for your staff.

After you enter your new password, define your Assumed School Code and other DL Tools software settings by clicking **Tools**, **Setup** from the main DL Tools screen.

Resetting Your User ID and Password

If you have forgotten your password, your DL Tools administrator can use the Security Users function to give you a new one.

To Access the Security Users Function

1. Select **Tools** from the menu bar.

2. Select **Setup**, **Security Users**.

If you are the DL Tools administrator and you have forgotten your password, call CPS/SAIG Technical Support for help with resetting the password for the default SYSADMIN user ID.

System Requirements

Hardware and Software Requirements

The Student Assistance General Provisions regulations in 34 CFR 668.16(o) provide, in part, that to be administratively capable an institution must participate in electronic processes designated by the Secretary. These processes were first identified in a notice published in the *Federal Register* on September 19, 1997. In that Notice, we also provided information regarding the hardware and software requirements needed for an institution to participate in the designated electronic processes.

Because of advances in technology, we updated those hardware and software requirements in the *Federal Register* Notice published on December 22, 2000, and, most recently, in the *Federal Register* Notice published in September 2004.

The current designated electronic processes and new minimal and optimal hardware and software requirements can be found in the September 2004 Notice, available on the IFAP Web site at ifap.ed.gov/fregisters/FR09142004.html.

The following minimum and optimal hardware and software configurations are required for DL Tools for Windows Release 7.0 users, per the September 2004 notice:

	Minimum Configuration	Optimal Configuration
IBM or Fully IBM-compatible PC	1.2 GHz Processor	2.8 GHz/333 MHz PC
	512 MB RAM	1 GB RAM
	60 GB Hard Drive	80 GB Hard Drive
	48x CD-ROM Drive (CD-RW recommended)	48x CD-ROM Drive (CD-RW recommended)
	Windows-compatible keyboard and mouse	Windows-compatible keyboard and mouse
Monitor and Video Card	Capable of SVGA (Super Video Graphics Adapter) resolution, 800 x resolution (800 x 600) or higher	Capable of SVGA (Super Video Graphics Adapter) resolution, 800 x resolution (800 x 600) or higher
Internet Connection*	56 Kbps modem (meets High-speed Internet or is upgradeable connection [for example, to V.90 standard])	High-speed Internet or is upgradeable connection (for example, to V.90 standard or DSL).
Printer	Laser printer capable of printing on standard paper (8.5" x 11")	Laser printer capable of printing on standard paper (8.5" x 11")
Operating System	Windows 2000 or Windows XP Professional	Windows 2000 or Windows XP Professional

*A connection to the Internet is necessary to access the Information for Financial Aid Professionals (IFAP) Web site located at ifap.ed.gov, and the FSAdownload Web site, located at fsadownload.ed.gov. In addition, an Internet connection must be established if you plan to exchange data with the COD System or other Federal Student Aid systems through the Student Aid Internet Gateway (SAIG) using the EDExpress for Windows software. While we include high-speed Internet connection only in the Optimal Configuration, we encourage schools to consider moving away from a dial-up connection if they intend to submit or receive large amounts of data. This will significantly reduce transmission time and will increase the probability of an uninterrupted transmission session.

The determination of which updated system configuration requirements to follow should be based on the number of Extensible Markup Language (XML) transactions your school will process. Pell, ACG, National SMART Grant, and Direct Loan origination and disbursement data is exported from EDExpress in the Common Origination and Disbursement (COD) Common Record format, which follows an XML schema (record layout).

Although all of the electronic processes included in the notice can be performed using the minimum configuration, we strongly recommend the optimal configuration if your school will send (transmit) and receive 4,000 or more records in an XML document (batch). We make this recommendation because XML file formats require greater storage and computing power.

LAN Hardware and Software Recommendations

In addition to the configuration recommendations outlined in the "Hardware and Software Requirements" section, the following hardware and software components are recommended for running DL Tools in a LAN environment:

- Network Operating System: Novell NetWare versions 3.12 or above or 4.11 or above, Windows 2000 Server, Windows 2000 Advanced Server, or Windows 2003 server

  Note: Novell NetWare versions 3.12 and 4.11 are separate products.

- 16 megabit/sec transfer rate on the network for token ring, 10 megabit/sec transfer rate on the network for Ethernet, or the maximum transfer rate your network topology supports

Refer to "Systems Requirements" for a complete listing of the general hardware and software required for DL Tools.

Recommended Items to Consider

We strongly encourage you to use the following additional tools to assist you in managing and protecting your financial aid data:

- Backup system (for example, a CD or DVD "burner" drive with Read/Write capability, or a Flash Drive) with sufficient capacity to store your data (we recommend that you test your backup data regularly to make sure it's working)

- Power supply backup and surge protectors

- Phone line surge protector

- Virus scan software with current virus definitions

Estimating Hard Disk Space

The following information gives you an estimate of how much hard disk space is required for each ED software product and for certain types of records.

To find out the approximate total space required, add the amounts shown for each ED software product and the types of records you are using. You should also take into account other software products installed on your PC. For example, the total space required for 5,000 ISIR, National Student Loan Data System (NSLDS), Packaging, Pell, and Direct Loan records using all of the software products listed is approximately 119 MB.

Each software product requires the following space:

Product	Size
EDExpress for Windows	16 MB
EDconnect for Windows	15 MB
DL Tools for Windows	5 MB
Student Status Confirmation Reporting (SSCR) with 300 records	6 MB

Each set of 5,000 records requires the following space:

Record	Size
ISIR	16 MB
NSLDS	7 MB
Packaging	3 MB*
Pell	2 MB**
Direct Loan	49 MB***

*   Includes only ISIR data imported into Packaging, for example, no budgets added, no records packaged, etc.
**   Includes two anticipated disbursements per origination record
*** Includes origination records only; no disbursements

Local Area Network (LAN) Information

Installing the Software on a LAN

Installation Options

You can install the DL Tools software to a LAN using one of three options:

1. **Network Server**. Use this option *only* when you are installing DL Tools for Windows to a LAN for the first time. The Network Server option only installs the DL Tools database to a LAN location. It does not install the DL Tools program files.

   Important Installation Note: If you want to upgrade from Release 6.0 to Release 7.0 and carry your 2005-2006 and 2006-2007 data forward into your Release 7.0 database, do not select the Network Server option. Instead, only perform Workstation installations on all PCs that currently have Release 6.0 installed.

   Note: If you receive a "ComponentMoveData" error message during a Network Server installation, you may not have sufficient network rights to install the database to your LAN. Check with your technical support staff if you receive this error message.

   Warning for Subsequent Installations: Use caution when using the Network Server installation option. If you already have a DL Tools database (DLT.mdb), the Network Server option will overwrite your database and you will lose all existing student data. You will receive a warning message during the installation if you are at risk of overwriting your database.

2. **Workstation Full**. Use this option when you are installing DL Tools Release 7.0 to upgrade from Release 6.0 to Release 7.0, or to install a subsequent upgrade release (for example, from Release 7.0 to Release 7.1) on a workstation that will be used to access a LAN-based copy of the database. If you have already performed a Workstation installation of DL Tools, you can use the option subsequently to add components (such as Help files) that you did not install the first time. This option leaves all other database and system settings intact.

The database is updated with the DL Tools Release 7.0 changes the first time you access the Release 7.0 software following completion of all of your Workstation installations. You will no longer be able to access data in this database using DL Tools Release 6.0 after this.

Important Back-up Note: You cannot access 2004-2005 data in your DL Tools database after you upgrade from Release 6.0 to Release 7.0. We strongly recommend you create a back-up copy of your Release 6.0 database (DLT.mdb) before upgrading to Release 7.0, in the event that you need to access your 2004-2005 data using an earlier version of DL Tools on another PC.

Important Installation Note: You must be an Administrator on your workstation to install DL Tools, Release 7.0 in the Windows 2000 or Windows XP operating systems. If you are not an Administrator, you will receive a warning when you try to install DL Tools. After an Administrator has installed DL Tools, you can run it as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. No workarounds exist for these Windows rights issues. Consult with your school's technical department if you receive a warning that an Administrator must install the DL Tools software.

Installation Instructions

Follow the instructions in this section for installing the DL Tools software on a network. For example:

- If you are installing DL Tools for the first time, perform a full installation and follow the steps provided in "First Time Network Installation."

- If you are installing DL Tools after you have created data in the database, follow the instructions provided in "Subsequent Network Installation."

When you perform a workstation installation, the executable file for DL Tools (**DLT.exe**) and all other program files are installed to the workstation's local hard drive. Do *not* install the program files to your LAN.

The installation modifies all DL Tools program group icons on your Windows Start Menu folder to point to the executable file on your local hard drive.

Installing the DL Tools executable file (**DLT.exe**) to the workstation's hard drive rather than a LAN improves the speed and performance of the software because DL Tools uses the combined resources of the workstation and the LAN instead of those of the LAN alone.

Note: The DL Tools software can be installed in Safe Mode, if necessary, but it cannot be run in Safe Mode.

Note: Close all running Windows applications before you proceed with installation.

First Time LAN Installation

To Install the Software on a LAN for the First Time

1. First, select the **Network Server** installation option to install only the DL Tools for Windows database (**DLT.mdb**) on the LAN, not the DL Tools program files.

2. Enter the network server location where you want to install the DL Tools for Windows database. You can type the path or click the **Browse** button.

3. Follow the prompts provided by the setup program.

4. Perform a **Workstation Full** installation on *all* workstations that will access the LAN-based copy of the database for this release of DL Tools. The Workstation Full option installs all program files, including the executable file (**DLT.exe**) to your local hard drive.

   Note: The Workstation Full installation option prompts you for the location of the database installed during the Network Server installation (step 2). Be sure you know the location of the database on your LAN before installing DL Tools.

Additional Instructions

You are asked two location questions during a **Workstation Full** installation:

- The software first prompts you to enter the location of the database on the LAN. This question is asking where your DL Tools database is located, not where you want the software's program files installed.

- After the software has located the database, the software asks you where you want to install the program files. Your response should be the default location, **C:\Program Files\EDESuite\DL Tools for Windows**, or another local workstation designation.

Subsequent LAN Installation

To Install DL Tools on a LAN Where the Software Is Already Installed

1. You should first create a reliable, functioning backup version of your existing DL Tools database (**DLT.mdb**) before upgrading to a new release.

2. Do *not* use the **Network Server** installation option for a subsequent LAN installation of DL Tools. The **Network Server** installation option is only for users installing DL Tools for Windows to a LAN for the first time. Choosing this installation option installs an empty DL Tools database file (**DLT.mdb**) on the LAN, overwriting your existing database.

   If you select the **Network Server** installation option for a subsequent LAN installation of the DL Tools software, the installation program alerts you that the DL Tools for Windows database has already been installed in the specified directory. Click **OK** to return to setup and choose a different installation option.

3. Click the **Workstation Full** installation option.

4. When prompted for the location of your DL Tools for Windows database (**DLT.mdb**), provide the location of your existing database for Release 6.0 (if installing a subsequent upgrade version). Follow this and other prompts provided by the setup program to run the installation.

5. Repeat the installation process for each workstation that accesses DL Tools for Windows.

If this is a first-time upgrade to DL Tools Release 7.0 (from Release 6.0), the database is upgraded after all workstation installations are complete. The upgrade occurs when a user accesses the software for the first time. Subsequent installations may update the database, depending on the nature of the release and the issues or enhancements being added.

Note: All workstations should be upgraded with the latest release before you open the DL Tools software to run the database update. If you fail to do this, any workstation not updated receives a software version/database mismatch error message if a user tries to run DL Tools.

Note: If you are adding a workstation to your LAN environment, perform a **Workstation Full** installation of the current release of DL Tools for that workstation.

To Install Subsequent and Future Releases

For all future releases of DL Tools for Windows, Release 7.X, perform a **Workstation Full** installation. The database structure is updated but not overwritten. Follow the instructions in "Subsequent LAN Installation" for more information.

Note: Some DL Tools service releases only update program files on your workstations, and do not perform any updates to your database. Refer to the electronic announcement and other documentation posted for a given DL Tools release for more information on the installation process that should be performed.

Instructions for Schools with Diskette Directories on a Server

To Install the Software Using "Disk" Files

If you want to copy the installation "disk" files to a file server so you can perform workstation installations from the server, use the following steps:

1. Create an overall "Install" folder, then create subdirectory "disk" folders for each diskette folder downloaded from the FSAdownload Web site. For example, if you need to download six diskette installation files, create the overall directory and six subdirectories on the file server as displayed below:

   \Install

   \Install\DISK1

   \Install\DISK2

   \Install\DISK3

   \Install\DISK4

   \Install\DISK5

   \Install\DISK6

   Note: The parent folder can have any name, but the subdirectories must be named DISK1, DISK2, etc.

2. Copy the contents of each disk into its corresponding folder on the LAN.

3. Install DL Tools on each workstation from the file server by running **setup.exe** from the DISK1 folder.

LAN Server Compatibility

DL Tools can be used as single-user or multi-user software. It can be run on the following network operating systems:

- Novell NetWare 3.x, 4.x, and 5.x

- Windows 2000 Server

- Windows 2000 Advanced Server

- Windows 2003 Server Family

Caution: DL Tools makes extensive use of Microsoft Access as a database engine, so you should not run the software on peer-to-peer networks such as the following brands:

- DEC Pathworks

- IBM LAN Server

- Sun PC-NFS

LAN Cautions

When multiple users are concurrently using the DL Tools database, the student records being modified are locked. In addition, certain functions are locked when concurrent access would degrade the system or disrupt a process.

Examples include:

- The DL Tools database is locked when the executing function is mass loading records, such as the Import function.

- When performing a Rebuild on an EDExpress database using DL Tools, the student records in EDExpress being recreated will be locked until the Rebuild process is complete.

- Records are locked when an executing function needs stable data for updating or printing.

LAN Messages

Novell

These messages notify users when a locking situation occurs:

LAN Error Message

Condition

<Database> is locked and cannot be accessed at this time.

If the database remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point before execution.

Record in use - Retry later.

If the record remains locked after five seconds of continual attempts, you are returned to the menu bar or to the point before execution.

Function in use - Retry later.

If the function remains locked after five seconds of continual attempts, you are returned to the menu bar.

Additional LAN Instructions

If you are using a Novell NetWare product, enter the following commands from the NetWare Server Console prompt:

Set Maximum Record Locks Per Connection = 10000

This line should also be added to the AUTOEXEC.ncf file on the NetWare server.

Windows 2000 or XP

You must be an Administrator on your workstation to install DL Tools Release 7.0 in the Windows 2000 or Windows XP operating systems. If you are not an Administrator, the installation program warns you that you do not have sufficient rights to install the software. After an Administrator has installed DL Tools, you can run DL Tools Release 7.0 as a member of the Power Users group. If your database is on a network server, you must be a Power User or higher on the network (or "domain") as well as on your workstation. No workarounds exist for these Windows rights issues.

For more information, visit microsoft.com and search for "file protection" to view Microsoft articles explaining the technical details of Windows 2000/XP file protection.

Getting Help

Basics

To get help with the installation of DL Tools:

- Review installation instructions.

- Become familiar with your PC.

- Contact your system administrator.

- Use DL Tools online Help.

- Contact Technical Support.

Review Installation Instructions

If you have problems installing DL Tools, first review the installation instructions again, then try repeating the installation process (make sure you include all steps).

If you are still having difficulty, contact CPS/SAIG Technical Support.

Become Familiar with Your PC

After you have successfully completed the DL Tools installation, click **System Information** from the Help menu.

Compare this information to the required configuration listed in the "Hardware and Software Requirements" section earlier in this guide. You may need to upgrade your equipment or your system's configuration.

Contact Your System Administrator

Your school or organization may have additional instructions for installing software using your PC. For example, you may receive an error if you are trying to install the DL Tools software to a drive for which you do not have access.

Use DL Tools Online Help

Instead of a paper user's guide, DL Tools has online Help. You can access online Help by using any of the following methods:

- From the **Help** menu, choose a Help command.

- Choose the **Help** button available in most dialog boxes.

- Use the keyboard or mouse to select an item from a menu, and then press **F1** to see a description of the item.

- Select a dialog box option or command and then press **F1**, or click the **Help** button to move directly to an explanation of the option.

- Use the **Help** toolbar button to obtain help on menu options and other toolbars.

Technical Support

FSATECH Listserv

FSATECH is an e-mail listserv for technical questions about the U.S. Department of Education's systems, software, and mainframe products. For more information about FSATECH, including how to subscribe, go to fsa4schools.ed.gov, click "Listserves/Mailing Lists" on the left menu, and click the "FSATech listserv" link.

CPS/SAIG Technical Support

CPS/SAIG Technical Support can assist you with any questions regarding:

- Technical assistance

- Software functionality

- ISIR and custom file layouts

- EDconnect functionality

Call CPS/SAIG Technical Support at:

800/330-5947

TDD/TTY: 800/511-5806

or e-mail your inquiries to CPS/SAIG Technical Support at:

CPSSAIG@ed.gov

See the topic "CPS/SAIG Technical Support" in the online Help for more information.

Representatives are available to assist you between 7 a.m. and 7 p.m. (CT), Monday through Friday, excluding holidays.

Guidelines for Calling Technical Support

When you call CPS/SAIG Technical Support, you must be at your PC and prepared to provide the following information:

- Your TG ID (TG followed by a five-digit numeric or alpha-numeric ID).

- The release of the software you are using (under Help/About DL Tools for Windows).

- The type of hardware/network you are using (including total RAM, version of Microsoft Windows, other running applications, LAN type if applicable, and available disk space).

- The exact wording of any error messages you received, as they displayed on your screen.

- A detailed description of the utility or function you were running when the error occurred, and the steps you took to get to that utility or function.

- A description of any resolution steps you took before calling.

CPS/SAIG Voice Response System

The CPS/SAIG Voice Response System has a telephone routing system to assist you in designated areas. When you call, you are asked to enter:

1 for an English-speaking operator

2 for a Spanish-speaking operator

For a complete listing of all Federal Student Aid sources of assistance, go to the Financial Aid Professionals Web site at fsa4schools.ed.gov/help/contacts.htm.